
Top 10 reasons for business valuation



Wealth
Management

in collaboration with BizEquity

Knowing the true value of your business is critical to proper business planning and achieving personal goals. Through our valuation process, we can help answer the questions that will lead you to make informed decisions for your future.

... Let us show you how.

- 1 Better understand **your business** and its potential
- 2 Know the value of your largest asset so you can plan for **retirement**
- 3 Ensure the business and your family are **properly protected**
- 4 Create a **succession plan**
- 5 Pay the right amount when you **buy** a business
- 6 Get what it is worth at **sale**
- 7 Create **buy/sell agreements** with business partners
- 8 Explore **funding opportunities**
- 9 Establish a Trust or create an **estate plan**
- 10 Prepare for **taxable events**, such as gifting or grants

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